ClubRunner

How do I merge contacts?

Michael C. - 2021-02-25 - Contacts

Club members and Officers may add the same person into ClubRunner in different areas. For example: as an attendance meeting guest, and/or as a volunteer. These areas feed into the **Contacts Module**, so the Club can contact them at a later date. As a result, the same person may be located in the **Contacts Module** multiple times. To merge or combine these multiple contacts, use the **Merge Contacts** tool. To learn how to use this tool, please follow the steps below:

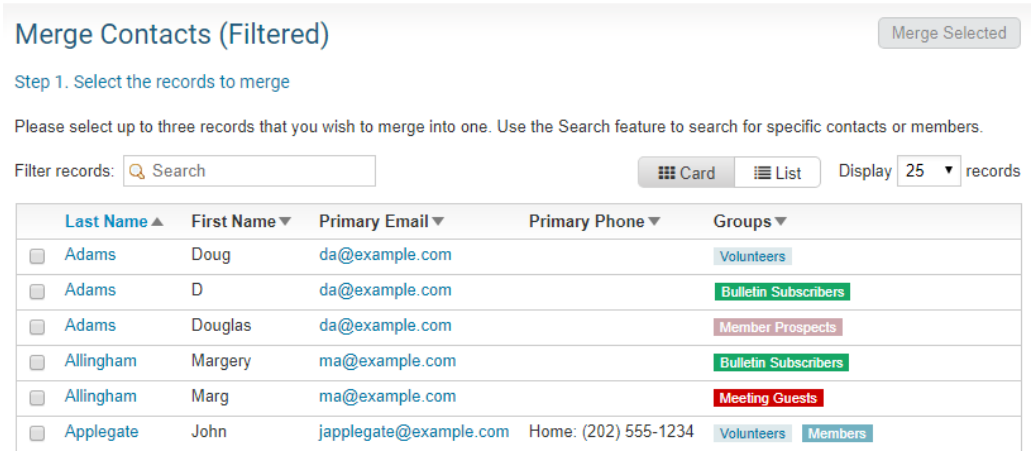
Note: You could use this tool to remove or delete contacts by creating a contact named "Deleted" and merging contacts you would like to remove into this contact. We do not recommend removing contacts, but if the contact was entered in error, this is the best way to remove it.

1. Please go to the website's homepage and login. Then click on the **Member Area** near the top right.

2. On the grey menu bar near the top, click the tab **Contacts**.

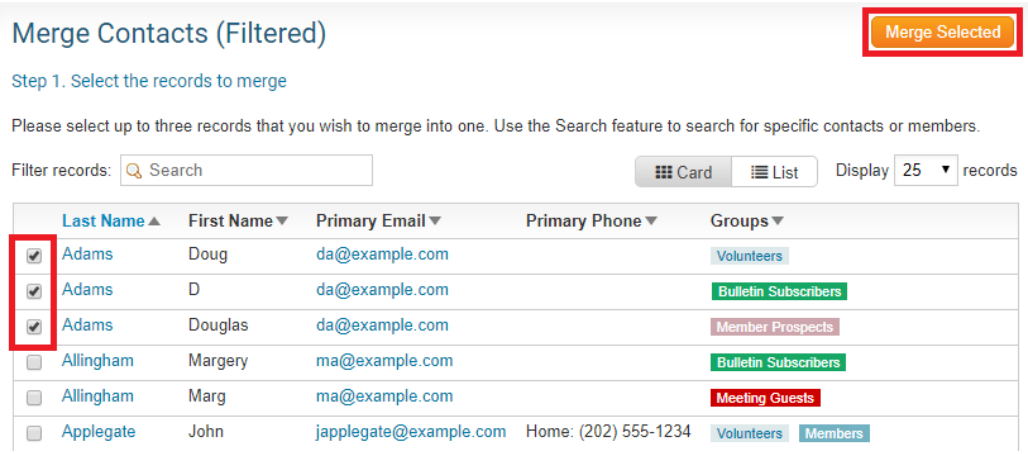
3. On the blue menu bar click the link **Merge Contacts**.

4. This takes you into the **Merge Contacts** page. As illustrated below, there are a few contacts which have duplicates. These are: Doug Adams, D Adams, Douglas Adams; and Margery Allingham and Marg Allingham.

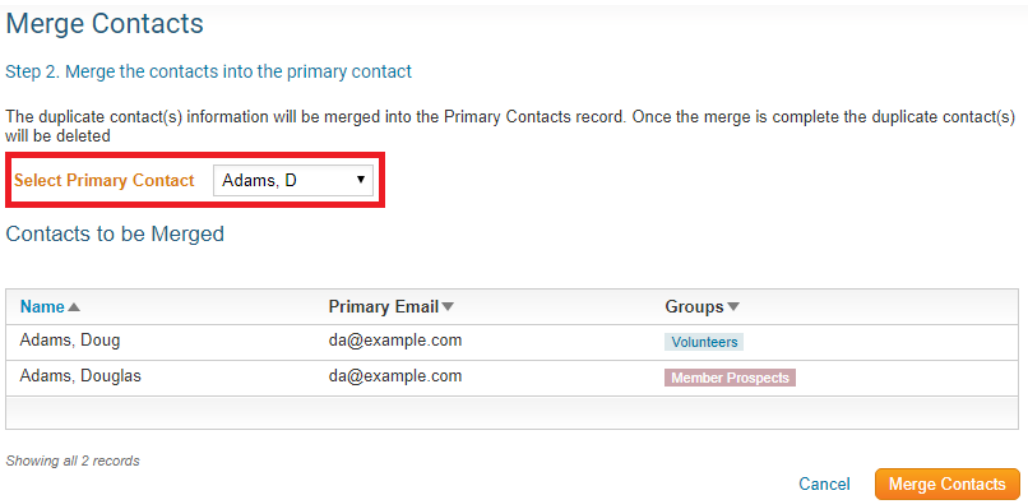


5. Add a check mark beside the contacts you would like to merge together. Then click the **Merge Selected** button near the top right.

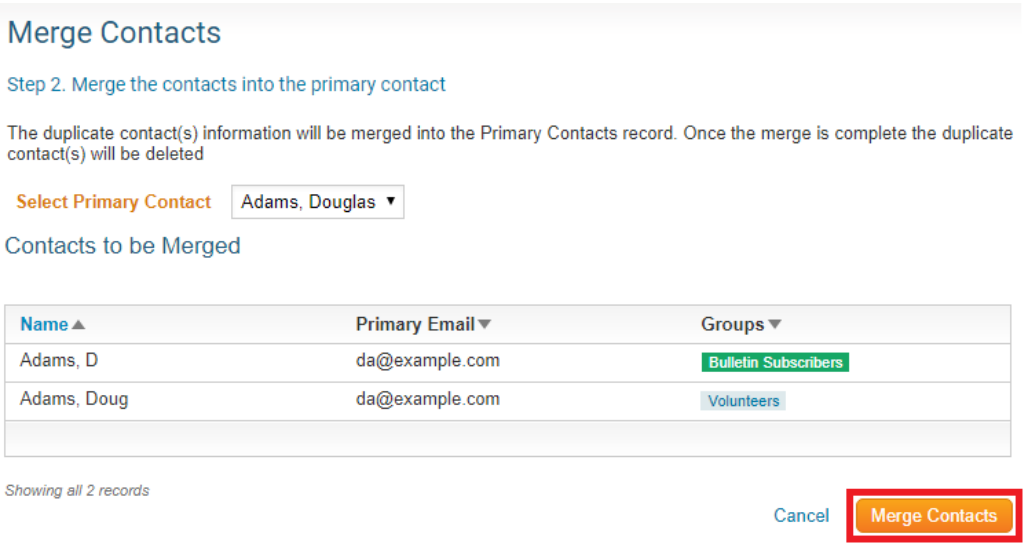
   Note: You can only select a maximum of **three contacts** in total to merge at once.



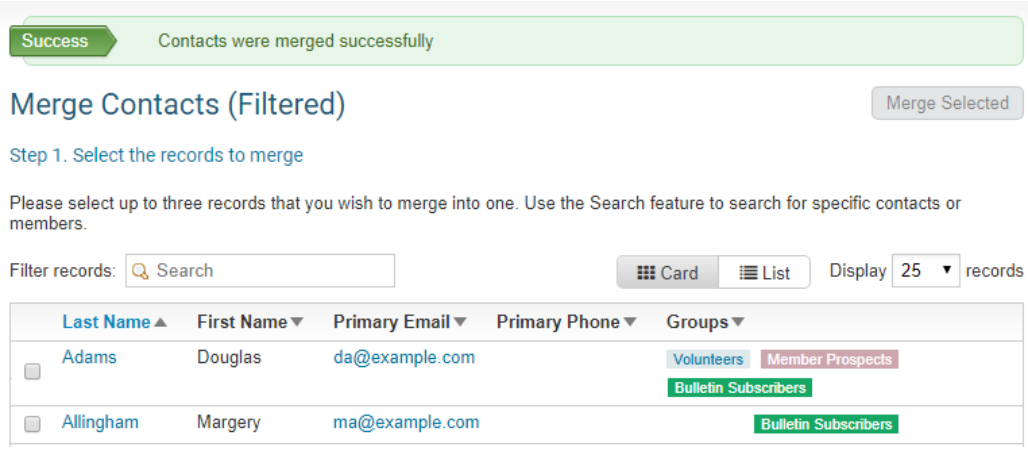
6. Using the drop down box called **Select Primary Contact**, select the contact you wish to be the 'master record'. In other words, the other contacts would merge into this one. Once finished our system deletes the 'secondary' contacts.



7. Once done, click the **Merge Contacts** button near the bottom right.



8. You should now see a **Success** message box saying the contacts were merged. As you can see below, Douglas Adams is no longer duplicated. All the other areas in ClubRunner where the contact was listed have now been updated to reflect this merger.



Related Content

- How do I delete a contact?
- How do I add a new contact?